ForwardHealth interChange
Internet Partner Portal Training Guide
For WIC Workers

Version 1.3
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1 Introduction

1.1 Introduction

This document is a training guide for how to navigate and use the public and secure areas of the **ForwardHealth Partner Portal**.

The secure Partner portal can be used to perform the following functions:

- Check for Member enrollment information.

1.2 Purpose

The purpose of this document is to provide users with an overview of the components that make up the ForwardHealth interChange Partner portal and to provide instruction on how to navigate and perform basic functions in the system.

1.3 Key Terms and Concepts

1.3.1 ForwardHealth Wisconsin

- ForwardHealth brings together many state health care programs with the goal of creating efficiencies for providers and other stakeholders and improving health care outcomes for enrolled members.
  - BadgerCare Plus.
  - Wisconsin Medicaid, including Family Planning Waiver.
  - Wisconsin Well Woman (WWW) Program and WWW Medicaid.
  - SeniorCare.
  - Wisconsin Chronic Disease Program (WCDP).
  - BadgerCare Plus and Medicaid managed care programs.

1.3.2 ForwardHealth InterChange (iC)

- ForwardHealth interChange is a new system which replaces the Medicaid Management Information System (MMIS) which has been in place since 1977.
- Connectivity to the legacy MMIS is being discontinued with the implementation of ForwardHealth interChange.
- Partners, such as WIC workers, will access the new system using the ForwardHealth Portal. The portal will provide access to key information.

1.3.3 Key Terms

- **Member -** Replaces the term "Recipient". A Member represents an individual enrolled in any of the ForwardHealth health care programs in iC.

- **Member ID -** All members are assigned an ID. This number will replace the old MA ID number. The number is assigned from the Master Client Index (MCI) and will no longer include the SSN.
- **Benefit Plan** -Type of plan that designates the benefits covered and is based on the member's medical status code. Members may be enrolled in multiple benefit plans concurrently.
  - Example: SeniorCare and QMB.
  - Example: QMB and EBD Medicaid.
- **Enrollment -** Replaces the term "eligibility". Enrollment is used anytime a reference is made to a member who is eligible. A member may also be enrolled in a Managed Care program.
- **Case -** There are two types of cases: 1) MMIS cases and 2) CARES cases. Reference to a "case" is always MMIS unless CARES case is specifically stated.
- **Fiscal Agent –** EDS HP is the fiscal agent for the Wisconsin Medicaid and ForwardHealth Programs.

2 Getting Started

2.1.1 Passwords & Security

ForwardHealth Partner Portal

Initial Password

- In late October you will receive a notification from the State telling you to watch for your partner portal account information via email. On or before 10/27/08 you will receive an email that includes your Login ID and temporary password. To the extent possible, your login ID will be the same as it is in CARES; however, if duplicates with other users are encountered as the accounts are generated, your login ID may need to be changed.
- You will receive two emails – one with your login ID, and a separate one with your password. In the email you receive, there will be information on where to go to change your password. You will be required to change your password the first time you log in.
- If you do not receive an email with your login ID and password you should go to the Partner Portal on or after 11/1 and follow the instructions for requesting portal access.

General Password guidelines

- All portal users can change their password at any time. After logging in, you can click on the **Account** link on the secure Partner home page and then click the **Change Password** link on the Account home page.
- Portal account passwords expire every 60 days and users are prompted to change them.
- The password you create **MUST** have at least **eight** characters.
- Passwords must contain at least one **uppercase** letter, one **lowercase** letter, and one **number**.
- Passwords must not contain your real name or user name.
- When resetting your password, you cannot use any of your previous eight passwords.
- If you forgot your password, you can reset it yourself by answering security questions you will be asked to provide when you change the initial password you receive.

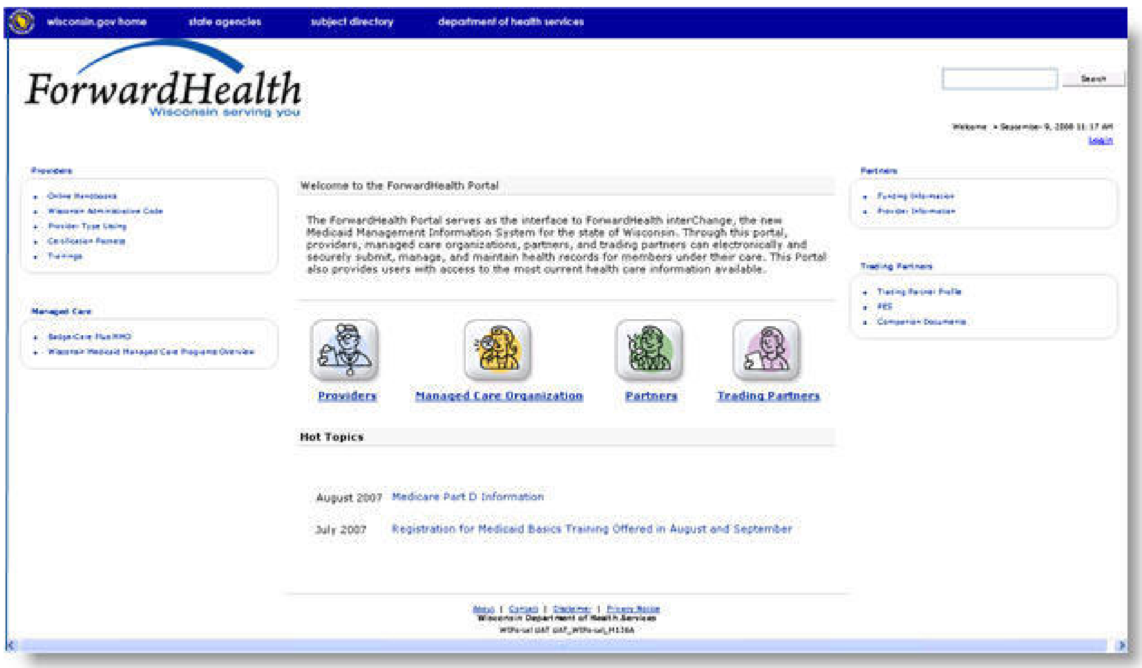
ForwardHealth interChange Password Problems

- For assistance with interChange password problems, please contact EDS Technical Support @ 221-4746, ext. 80551 or email VEDSTechSupport@wisconsin.gov.

3 ForwardHealth Partners Home Panel

Step	Action	Response
1.	Click the portal icon on your desktop, or enter **https://www.forwardhealth.wi.gov/** in the address bar in Internet Explorer, and click **Go**.	The public portal Home page displays.

ForwardHealth Main Portal Home Page Screen Graphic



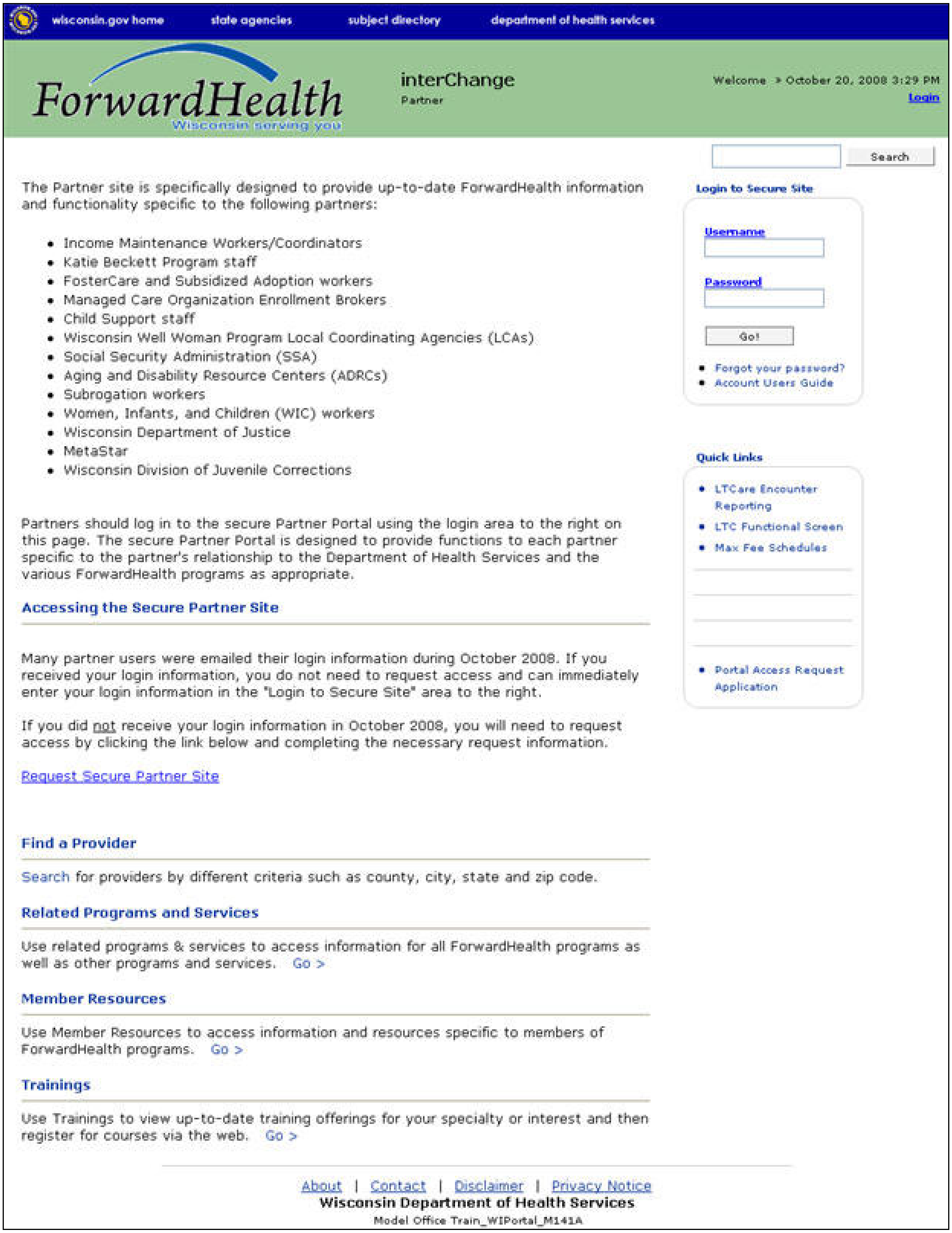
ForwardHealth Main Portal Home Page Screen Description

- As you can see, the **ForwardHealth Portal** is divided into four main areas as indicated by the four icons in the middle of the page. Users can click on an icon, or the link below the icon, to go to that area of the portal.
- This instruction guide will focus the secure Partner portal for WIC Workers.

3.1 Access the Partner Portal

Step	Action	Response
1.	Click the **Partners** icon.	The **Partners** public portal home page displays.

Partners Home Page Graphic



wisconsin.gov home | state agencies | subject directory | department of health services

ForwardHealth
Wisconsin serving you

interChange
Partner

Welcome » October 20, 2008 3:29 PM
Login

Search

The Partner site is specifically designed to provide up-to-date ForwardHealth information and functionality specific to the following partners:

- Income Maintenance Workers/Coordinators
- Katie Beckett Program staff
- FosterCare and Subsidized Adoption workers
- Managed Care Organization Enrollment Brokers
- Child Support staff
- Wisconsin Well Woman Program Local Coordinating Agencies (LCAs)
- Social Security Administration (SSA)
- Aging and Disability Resource Centers (ADRCs)
- Subrogation workers
- Women, Infants, and Children (WIC) workers
- Wisconsin Department of Justice
- MetaStar
- Wisconsin Division of Juvenile Corrections

Partners should log in to the secure Partner Portal using the login area to the right on this page. The secure Partner Portal is designed to provide functions to each partner specific to the partner's relationship to the Department of Health Services and the various ForwardHealth programs as appropriate.

Accessing the Secure Partner Site

Many partner users were emailed their login information during October 2008. If you received your login information, you do not need to request access and can immediately enter your login information in the "Login to Secure Site" area to the right.

If you did not receive your login information in October 2008, you will need to request access by clicking the link below and completing the necessary request information.

Request Secure Partner Site

Find a Provider

Search for providers by different criteria such as county, city, state and zip code.

Related Programs and Services

Use related programs & services to access information for all ForwardHealth programs as well as other programs and services. Go >

Member Resources

Use Member Resources to access information and resources specific to members of ForwardHealth programs. Go >

Trainings

Use Trainings to view up-to-date training offerings for your specialty or interest and then register for courses via the web. Go >

Login to Secure Site

Username

Password

Go!

- Forgot your password?
- Account Users Guide

Quick Links

- LTCare Encounter Reporting
- LTC Functional Screen
- Max Fee Schedules
- Portal Access Request Application

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Wisconsin Department of Health Services
Model Office Train_WIPortal_M141A

Partners Home Page Description

- As you can see, this screen provides links to some basic information that can be accessed by users who are not logged in, such as finding a provider and contact information for Members interested in applying for BadgerCare Plus benefits.
- On the left of the screen are text entry fields where users can enter their login information for access to the Partner secure site.

3.2 Log into the Partner Portal

Step	Action	Response
1.	Enter your user name in the **Username** field.	
2.	Enter your password in the **Password** field.	
3.	Click **Go**.	The Partners secure page displays

ForwardHealth Partner Home Page Graphic

4 iC Functionality

Step	Action	Response
1.	Click the **iC Functionality** tab.	A list of information panels users can access from interChange displays.

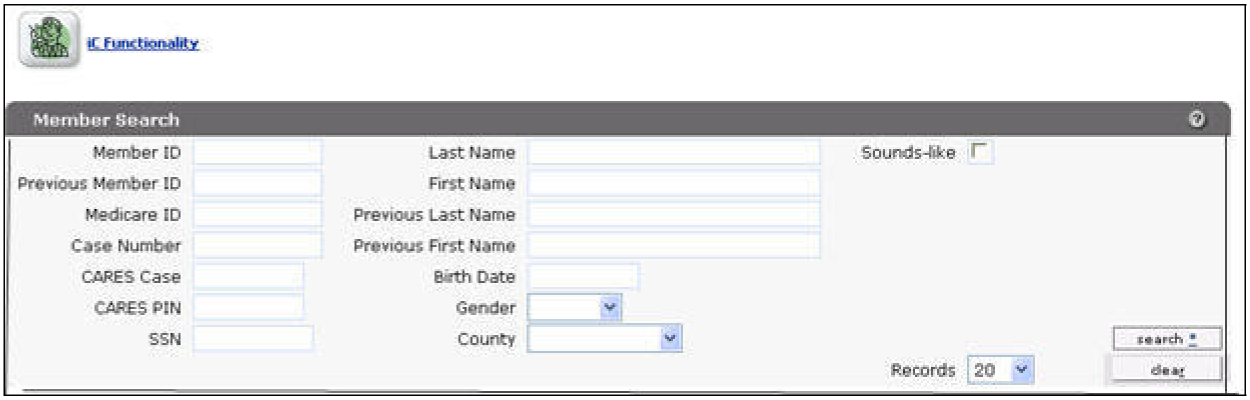
iC Functionality Graphic

4.1 Member

4.1.1 Member Search

Step	Action	Response
1.	From the list of iC Functionality links, click **Member Search**.	The **Member Search** panel displays.

Member Search Panel Graphic



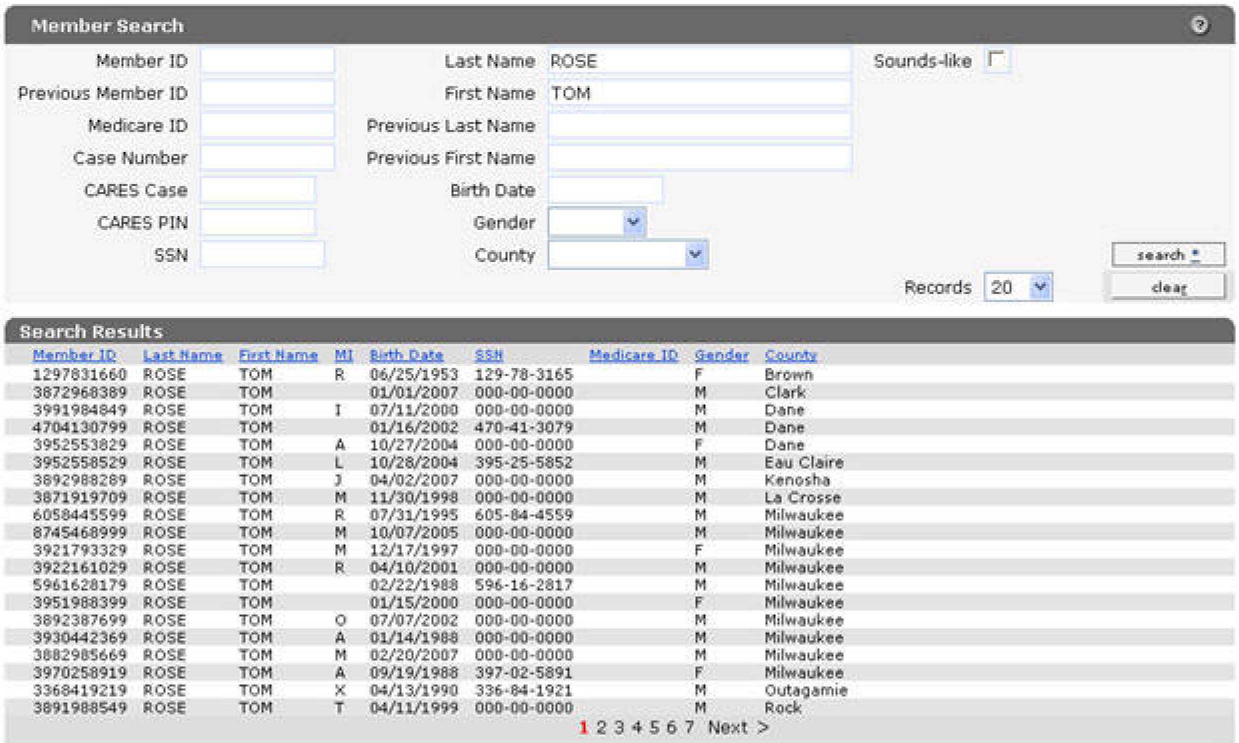
Member Search Panel Description

- This panel allows you to search for a member using any of the fields displayed.
- Once you have entered information in the fields, click **Search** to initiate the search. Clicking the **Clear** button clears the information from all the fields.
- If searching by Member ID and the record is not found. Enter the ID in the Previous Member ID field in case the member's ID has changed.
- The **Sounds-like** checkbox on this panel can be used when you are searching by a member's name and are not sure of the correct spelling. Clicking the **Sounds-like** check box performs a phonetic search on the information contained in the last name field.
- To narrow down the results of your search, enter as much information about the member as possible.
- The **Records** drop-down is used to set the maximum number of records per page that are returned.

Search for a Member Record Using a Member's Name

Step	Action	Response
1.	Enter the member's last name in the **Last Name** field.	
2.	Enter the member's first name in the **First Name** field.	
3.	Click **Search**.	The **Search Results** panel displays.

Member Search Results Panel Graphic



Member Search

Member ID		Last Name	ROSE	Sounds-like	
Previous Member ID		First Name	TOM		
Medicare ID		Previous Last Name			
Case Number		Previous First Name			
CARES Case		Birth Date			
CARES PIN		Gender			
SSN		County			search
				Records 20	clear

Search Results

Member ID	Last Name	First Name	MI	Birth Date	SSN	Medicare ID	Gender	County
1297831660	ROSE	TOM	R	06/25/1953	129-78-3165		F	Brown
3872968389	ROSE	TOM		01/01/2007	000-00-0000		M	Clark
3991984849	ROSE	TOM	I	07/11/2000	000-00-0000		M	Dane
4704130799	ROSE	TOM		01/16/2002	470-41-3079		M	Dane
3952553829	ROSE	TOM	A	10/27/2004	000-00-0000		F	Dane
3952558529	ROSE	TOM	L	10/28/2004	395-25-5852		M	Eau Claire
3892988289	ROSE	TOM	J	04/02/2007	000-00-0000		M	Kenosha
3871919709	ROSE	TOM	M	11/30/1998	000-00-0000		M	La Crosse
6058445599	ROSE	TOM	R	07/31/1995	605-84-4559		M	Milwaukee
8745468999	ROSE	TOM	M	10/07/2005	000-00-0000		M	Milwaukee
3921793329	ROSE	TOM	M	12/17/1997	000-00-0000		F	Milwaukee
3922161029	ROSE	TOM	R	04/10/2001	000-00-0000		M	Milwaukee
5961628179	ROSE	TOM		02/22/1988	596-16-2817		M	Milwaukee
3951988399	ROSE	TOM		01/15/2000	000-00-0000		F	Milwaukee
3892387699	ROSE	TOM	O	07/07/2002	000-00-0000		M	Milwaukee
3930442369	ROSE	TOM	A	01/14/1988	000-00-0000		M	Milwaukee
3882985669	ROSE	TOM	M	02/20/2007	000-00-0000		M	Milwaukee
3970258919	ROSE	TOM	A	09/19/1988	397-02-5891		F	Milwaukee
3368419219	ROSE	TOM	X	04/13/1990	336-84-1921		M	Outagamie
3891988549	ROSE	TOM	T	04/11/1999	000-00-0000		M	Rock

1 2 3 4 5 6 7 Next >

- If there was more than one member that meets the entered criteria, the list of members matching the entered criteria displays on the **Search Results** panel.
- Columns display for each record found in the search. You can click on a column heading to sort your results. Clicking a column once will sort the results in ascending order by that column. Clicking the column a second time sorts them in descending order.
- Selecting a row will populate the member information panel.

Step	Action	Response
3.	Click on the row you wish to view.	The **Member Information** page displays.

Member Information Page Graphic

Member Information Page Graphic

- The **Member Information** page is comprised of three separate panels including:
  - The mini-search panel that allows you to search for a new member record using a Member ID or Case Number.
  - The **Member Information** panel, located in the middle of the page, displays basic information about the member.
  - The **Member Maintenance** navigation panel, located at the bottom of the page is the access point for panels that contain more detailed member data. Let’s take a look at the information on the **Member Information** panel.

4.1.2 Member Information Panel

Step	Action	Response
1.	Enter a valid Member ID in the **Member ID** field in the Search panel.	
2.	Click **Search**.	The information page for that Member ID displays.

Member Information Panel Graphic

Member Information

Member ID	0780195603	Name	FALTO, JONOLA L	Active	Active
MCI Ind	No	Prev Name		Linked ID	
CARES Pin	0000000000	CARES Case	0000000000	Case History	0780209151 10/18/07
Medicare ID		Address	C101 DRIVE	Benefit Plan	FSTMA 01/23/84-07/31/84
SSN	800-19-5603	Address 2	APT. A3	Medicare Cov	
Gender	Male	Address 3		Managed Care	
Birth Date	12/17/1966	City	BRAT	MC Special Cond	
Death Date		State	WI	TPL	No
Age	41	Zip	00104	Lockin	
Race	7 - Not Provided	Alt Address	No	NH Level of Care	
Ethnicity	00 Not Applicable	Phone		Patient Liability	
Language	UND - UNDETERMINED	Phone Type	No Phone	Deductible	
County	43 - Oneida	Add Phone		Last HlthChk Scrn	
Tribal Ind	No	Add Type	No Phone	Last HlthChk Dntl	

Member Information Panel Description

- The left section of the **Member Information** panel displays a high-level snapshot of a member's information at the time the page is accessed, including CARES PIN, SSN, gender, date of birth, age, etc.
  - The **MCI Indicator** field is a **Yes** or **No** field that indicates if the member ID is an MCI ID. If 'No', the member ID is a temporary ID.
- The middle section of the Member Information panel displays address information and other demographic data about the member, including any previous name, if applicable. The address displayed is the member's mailing address.
- The right side of the Member Information panel contains more fields that require some additional explanation.
  - The **Active** field on the Member Information page pertains to the member ID, not enrollment. It indicates the member had two separate IDs and the two IDs are linked keeping one "Active" (Active Field=Yes) and the other "Inactive" (Active Field=No). The **Linked ID** field displays information if the member has another ID that is linked to their present ID.
  - The **Case History** field uses a drop-down menu to identify the case head member ID number(s) and date(s) for cases the member is/was associated with.
  - The **Benefit Plan** field also has a drop-down menu that displays the benefit plans in which a member is/was enrolled. The field includes a benefit plan code and the effective dates of each plan.
  - The **Medicare Coverage** field contains the member's current Medicare coverage if **active**. It is blank if the member does not have active coverage. The field can show one or more of the following:
    - **A** for **Medicare Part A**, which is hospital insurance that pays for inpatient hospital stays, care in a skilled nursing facility, hospice care and some home health care.
    - **B** for **Medicare Part B**, which is medical insurance that helps pay for physician services, outpatient hospital care, durable medical equipment, and some medical services that are not covered by Part A

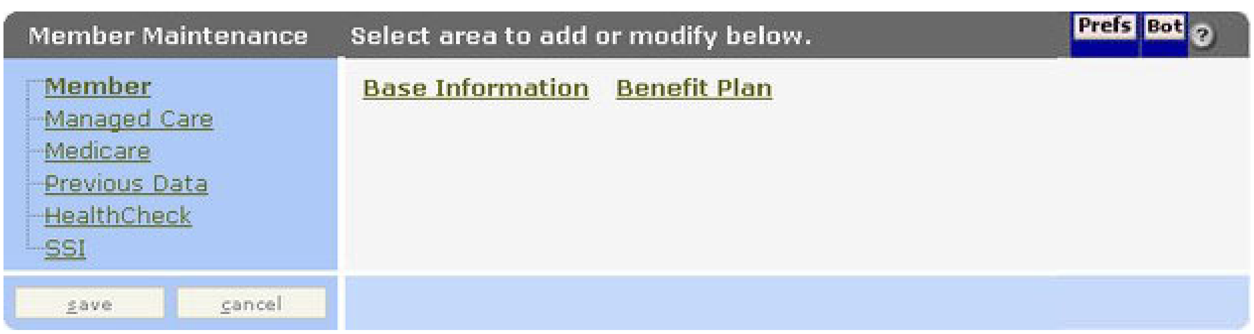
- **D** for **Medicare Part D**, which is prescription drug coverage.

- The **Managed Care Plan** field shows the plan and effective dates if the member is enrolled in an HMO, SSI/HMO, Family Care, PACE, Partnership or children's health Managed Care Plan.
- If applicable, the **MC Special Condition** field displays the member's Managed Care Level of Care if enrolled in long term care managed care program, and/or enrollment exemption codes and the corresponding effective/end dates.
- Similarly, the **TPL** (Third Party Liability) field will be populated with "yes" if the member has active third party insurance coverage,
- The **Lockin** field will be populated if a punitive restriction has been placed against the member, or if the member is enrolled in a hospice program. If a Lockin is in effect, an indicator with effective dates will populate the field.
- The **NH Level of Care** field is used to display nursing home level of care codes.
- The **Patient Liability** field designates the monthly institutional liability or waiver cost share amounts the member must contribute to their cost of care, along with the effective and end dates of the liability.
- **Deductible** indicates the member's current SeniorCare deductible and effective/end dates. This field does not apply to private insurance.
- The **Last Health Check Screening** field shows the date of the member's last medical screening.
- The **Last Health Check Dental** field below it displays the date of the member's last dental screening.

4.1.3 Member Maintenance Navigation Panel

Step	Action	Response
1.	Using the Member ID scroll down to the **Member Maintenance** navigation panel.	

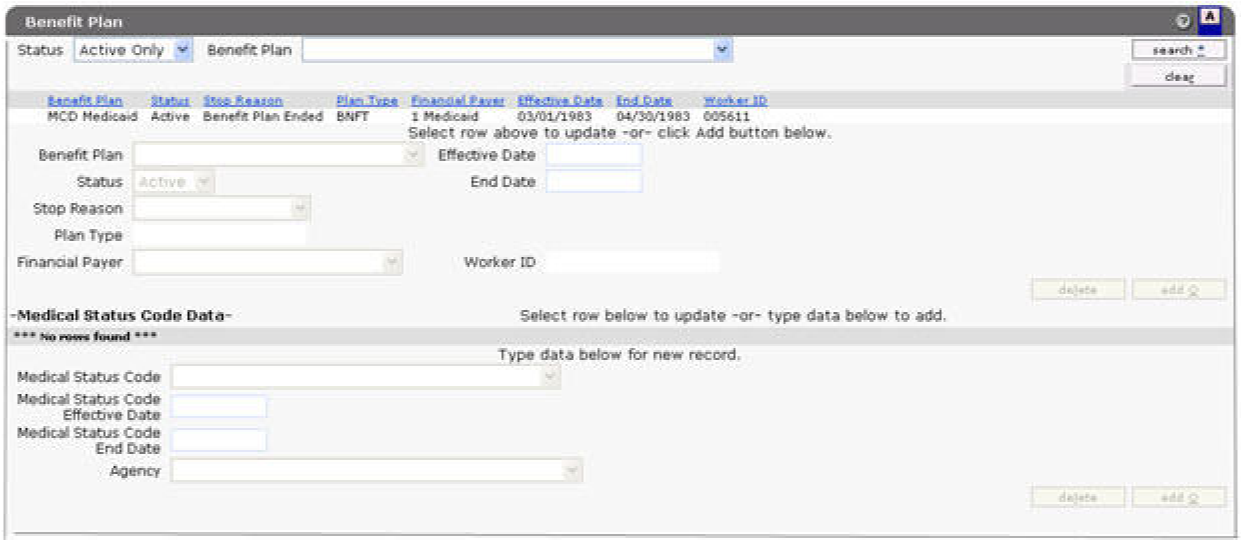
Member Maintenance – Member Navigation Panel Graphic



Benefit Plan Panel

Step	Action	Response
1.	On the left of the Member Maintenance panel, click **Member**.	
2.	Click **Benefit Plan** on right of the Member Maintenance panel.	The **Benefit Plan** panel displays.

Benefit Plan Panel Graphic



Benefit Plan Panel Description

- The **Benefit Plan** panel displays benefit plan enrollment and medical status code information. The default view is to see only the Active benefit plans. To see the Historical plans, or both Historic and Active, select the view from the **Status** drop-down menu and Click **Search**.
  - **Use the Benefit Plan** to determine what benefit plans a member is or has been enrolled in. A member may be enrolled in multiple plans in the same period similar to CARES. If the member has multiple benefit plans, you would click on one to display the medical status code information at the bottom of the panel.
  - The **Status** field on the Benefit Plan Panel indicates if the benefit plan displayed is active or historical. If a Benefit Plan was assigned to a member by mistake, we change its status to "H," which makes it "Historical": so it cannot be used to pay claims or for providers to verify enrollment.
  - **Stop Reason** displays a description for the termination of an enrollment period for a member.
  - **Plan Type** displays a code that identifies the type of plan in which the member is enrolled.
  - **Financial Payer** displays the unique program the claims transactions are processed under. Examples include Medicaid/BadgerCare Plus, Wisconsin Chronic Disease Program (WCDP), Wisconsin Well Woman Program (WWWP) and SSI.

- **Effective Date** is the ***first*** date that the member becomes enrolled in the Benefit Program.
- **End Date** shows the ***last*** date that the member is enrolled in the Benefit Program.
- **Worker ID** is the assigned ID of the certifying or coordinating agency's worker for that period.

- Clicking on a detail Benefit Plan line displays another section of the panel: **Medical Status Code Data**.
- The fields in this section are:
  - The **Medical Status Code** field, which is a code that represents the program under which the member was determined eligible and enrolled.
  - The **Medical Status Code Effective Date** is the first date in a period for which a member is or was enrolled.
  - The **Medical Status Code End Date** is the last date in a period for which a member is/was enrolled.
  - The **Agency** shows the member's certifying or coordinating agency for the selected benefit plan.
- Multiple medical status codes may be valid for a single benefit plan enrollment period. The benefit plan dates will represent the earliest start date and latest end date for the medical status periods valid within that benefit plan. In addition, multiple benefit plans may exist for the same period of time. These replace "combo" medical statuses.

5 General Portal Information

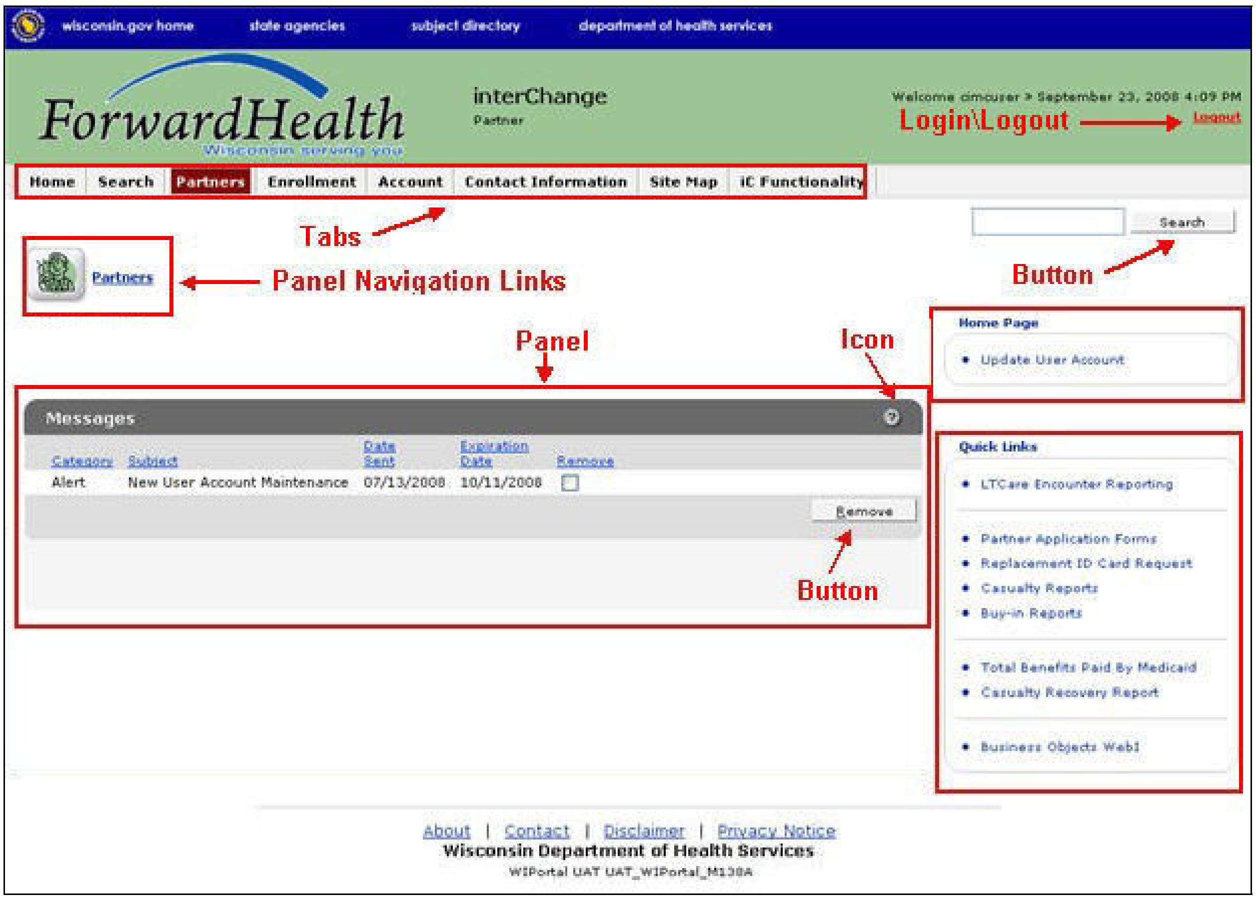
5.1 Logging On and Off the Portal

The quickest way to log onto the Portal is to click the **Login** link in the upper-right corner of any screen, and enter your username and password. Once you log in, the link changes to **Logout**.

When you are finished with any session, always remember to click the **Logout** link.

5.2 Portal Navigation

There are several navigation features on every screen and/or panel that display on the portal pages and panels.



- **Tabs**—Once you log in to the secure partner portal, the first tab that displays is the Partners tab. Click on any other tab to move to different parts of the Portal.
  - **Home** takes you back to the public portal Home page.
  - **Search** displays a text box to enter text, and you can select an area to search Partners

- **Enrollment** displays the Enrollment Verification panel, which lets you verify that a member is enrolled through his or her Member ID or SSN, and date of birth. This is a summary level verification tool.
- **Account** lets you manage your main account information, messages, and change your password. It also contains a link to the user guide for this tab, which is in PDF format.
- **Contact Information** lets you ask a question of tech support.
- **Site Map** is a series of links that imitate the tab structure and tab choices.
- **iC Functionality** is a subset of the panels you can access through the portal which Provide more detailed member information.
- **Panel**—The panel shown here is the Message panel that lets you know if there are any changes or new items for the Partner portal.

- **Login/Logout**—This is a link that toggles between displaying the username/ password text boxes (**Login**) or logging you out of the system (**Logout**).
- **Other features**: links at the bottom (About, Contact, Disclaimer, Privacy Notice) and top (Wisconsin.gov home, state agencies, subject directory, and department of health services) are part of every standard portal window and lets you know State-specific information.
  - It is important to note that users should **never** use your browser's **BACK** button to return to a previous screen.

5.2.1 Buttons

Below is a list of common buttons and the operations they are normally used for.

Button	Click it and this happens
Clear	Clears all the information entered into the fields on a panel.
Close	Closes a window, such as a popup window.
Save	Saves a modification made to a panel or a new record (for authorizated users that can make updates)
Remove	Deletes an onscreen message.
Search	Initiates a search.

5.2.2 Error Messages

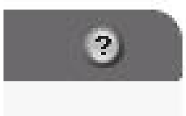
Error messages most commonly appear when you enter information incorrectly in a field or when you do not enter information in a required field. These error messages display just beneath the navigation links at the top of a panel but may also appear next to a field that is in error. Messages also display as a warning that the user is navigating away from a page.

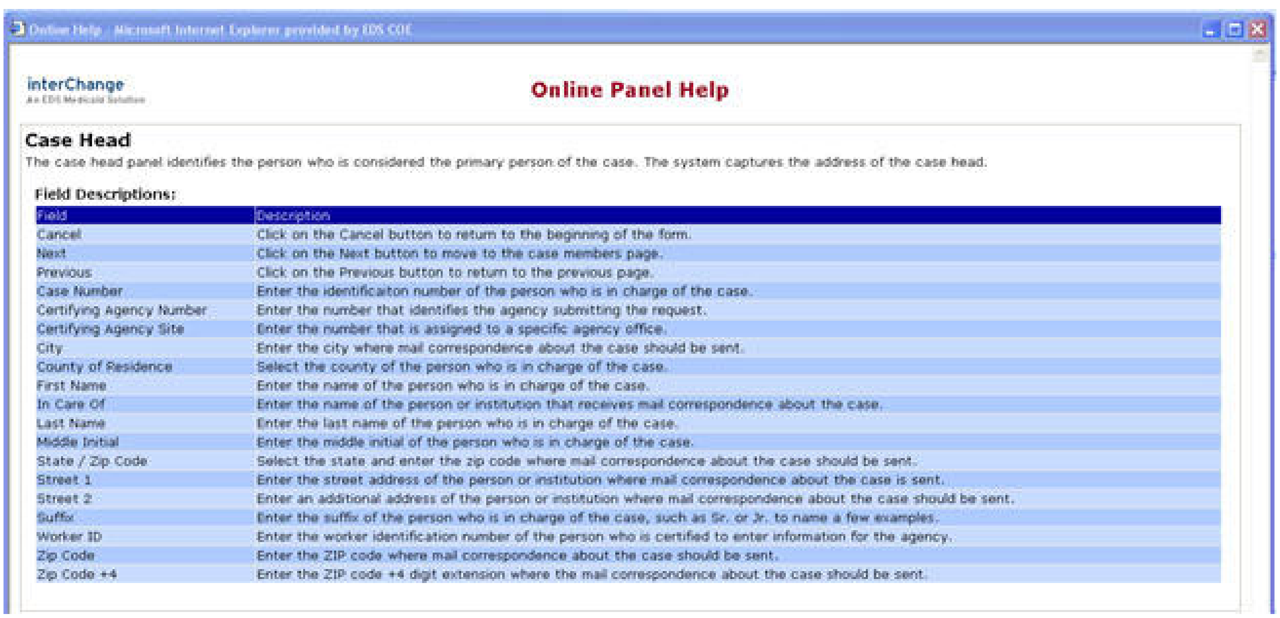
- If unsure what an error message means, users can find more error message information by clicking the question mark icon on the gray bar at the far right of each screen. The panel help with all field descriptions and error messages will appear.

5.3 Partner Portal Online Help

5.3.1 Panel Help

Panel help is accessed by clicking the question mark icon on the gray bar at the far right of each screen.





Case Head

The case head panel identifies the person who is considered the primary person of the case. The system captures the address of the case head.

Field Descriptions:

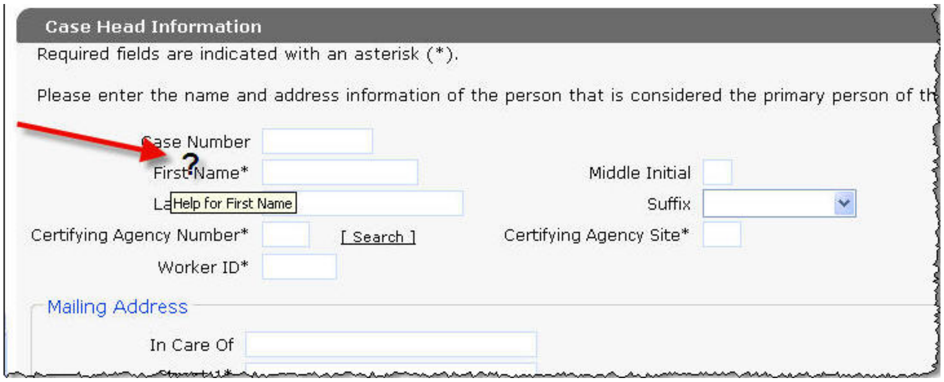
Field	Description
Cancel	Click on the Cancel button to return to the beginning of the form.
Next	Click on the Next button to move to the case members page.
Previous	Click on the Previous button to return to the previous page.
Case Number	Enter the identificaiton number of the person who is in charge of the case.
Certifying Agency Number	Enter the number that identifies the agency submitting the request.
Certifying Agency Site	Enter the number that is assigned to a specific agency office.
City	Enter the city where mail correspondence about the case should be sent.
County of Residence	Select the county of the person who is in charge of the case.
First Name	Enter the name of the person who is in charge of the case.
In Care Of	Enter the name of the person or institution that receives mail correspondence about the case.
Last Name	Enter the last name of the person who is in charge of the case.
Middle Initial	Enter the middle initial of the person who is in charge of the case.
State / Zip Code	Select the state and enter the zip code where mail correspondence about the case should be sent.
Street 1	Enter the street address of the person or institution where mail correspondence about the case is sent.
Street 2	Enter an additional address of the person or institution where mail correspondence about the case should be sent.
Suffix	Enter the suffix of the person who is in charge of the case, such as Sr. or Jr. to name a few examples.
Worker ID	Enter the worker identification number of the person who is certified to enter information for the agency.
Zip Code	Enter the ZIP code where mail correspondence about the case should be sent.
Zip Code +4	Enter the ZIP code +4 digit extension where the mail correspondence about the case should be sent.

Panel Help Feature - Question Mark Function Description

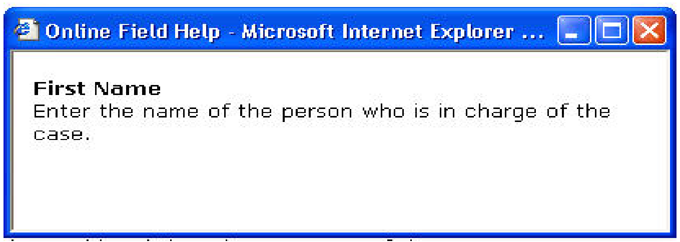
- ➢ The panel help lists the name of all fields and buttons on the panel (buttons alphabetically first, then fields alphabetically), along with their descriptions and error messages. These descriptions are the same as what users see when users access field help.

5.3.2 Field Help

- If users hover over the name of a field, users will see a question mark:



- When you click on the field, you see a pop-up box that includes the field description.



6 Other Information

WIC workers should use the partner portal to verify member enrollment. If for some reason you are unable to access the partner portal you can continue to contact Provider Services to obtain member enrollment information. When calling provider services you will need to provide the provider correspondent with your WIC provider number. The provider services correspondent uses this number as an access code so they can release member enrollment information to you.

If you have any type of questions about the partner portal please contact the partner portal help desk at (866) 908-1363 and they can assist you.